

Europe opens wallet: Saatchi

By LAUREL WENTZ

LONDON—Saatchi & Saatchi Co. predicts Europe will have the fastest growth in ad spending this year, while North America will have the slowest.

Worldwide, Saatchi is forecasting a 9.2% increase in ad expenditures in major media in 1988 to \$163.7 billion (AA, June 27). Excluding inflation, real growth would be 6%.

Saatchi predicts major media spending in North America will increase by 8.5% to \$80.8 billion in 1988 but will increase by only 6.8% in 1989 and 6.9% in 1990.

From a January prediction of 11% growth, Saatchi has lowered its projections for North American 1988 network TV expenditures to 10%, reflecting the uncertainty caused by the Writers Guild of America strike.

The 1989 network TV forecast also has been downgraded from 8% to 6% because of current softness in parts of the scatter market.

Internationally, the decline of the U.S. dollar caused the value in 1987 of the European market to increase by 15%, about \$5.6 billion, and the value of the Asia/Pacific market by 12%, about \$3 billion.

Major media ad spending in Europe, the fastest-growing region, is predicted to increase by 10.8% to \$47 billion this year, by 9.8% in 1989 and by 9.3% in 1990, due partly to the deregulation of TV

Worldwide ad spending to 1990

	1987 \$m	1988 \$m	% change	1989 \$m	% change	1990 \$m	% change
(Current prices)							
TV, print, radio and outdoor							
North America	\$74,484	\$80,785	+8.5	\$88,248	+9.8	\$92,159	+4.4
Europe	42,326	46,914	+10.8	51,521	+9.8	56,334	+9.3
Asia/Pacific	28,957	31,443	+8.6	34,176	+8.7	37,392	+9.4
Latin America	2,980	3,254	+9.2	3,514	+8.0	3,709	+5.4
Africa/Middle East	1,162	1,269	+9.2	1,371	+8.0	1,482	+8.1
Sub-total	\$149,909	\$163,665	+9.2	\$178,830	+8.0	\$191,166	+7.1
Below-the-line activities							
Direct mail							
North America	20,826	24,074	+15.6	27,608	+14.7	31,665	+14.7
Europe	6,843	8,143	+19.0	9,772	+20.0	11,726	+20.0
Sales promotion, point of sale and others							
U.S.	21,530	24,329	+13.0	27,005	+11.0	29,976	+11.0
Grand total	\$199,108	\$220,211	+10.6	\$241,215	+9.5	\$264,533	+9.7

Source: Saatchi & Saatchi Co.

throughout Europe.

In the U.K., Saatchi predicts a 1988 ad spending increase of 10.3%—amounting to 6.1% after inflation—to \$10.4 billion. The anticipated addition of a fifth U.K. TV channel in 1993 and the launch of three channels by direct broadcast satellite in late 1989 should keep the TV market growing.

In France, TV commercials filled seven hours a week in 1986. However, spots aired 20 hours a week

last year, when two new channels started and TF-1, France's largest channel, was deregulated and sold off by the government. Saatchi is looking this year for a 13.6% increase (9.9% after inflation) in ad spending to \$6.7 billion.

In West Germany, deregulation is moving more slowly, with two state-owned networks each airing 20 minutes a day of advertising and 82% of ad spending still going to print. Saatchi expects ad spending

growth of 4.5% (3% after inflation) to \$9 billion in 1988.

Ad spending in Italy, Europe's most deregulated TV market, is expected to jump 17.4% (or 11.3% after inflation) to \$5.2 billion this year.

Three European markets—Spain, Portugal and Greece—are expected to increase ad spending by more than 25% this year.

In Spain, growth of 28.4% (18.9% after inflation) to \$4 billion this year is predicted despite the impact of a

ban on TV advertising for cigarettes that takes effect in September.

In Portugal, Saatchi sees a 36.9% increase (26.8% after inflation) to \$278 million this year.

In Greece, ad spending shot up by 70% in the first quarter of 1988, prompting Saatchi to boost its 1988 forecast from 24.5% to a 34.9% (14.4% after inflation) increase to \$304 million.

Asia/Pacific is slated for an 8.6% increase in ad spending to \$31.4 billion in 1988, followed by an 8.7% increase next year and 9.4% in 1990.

Saatchi cited three reasons for strong growth in the region: fast growth in private-sector consumption in key markets like Japan; more media opportunities in markets including China, where TV set ownership is expanding quickly; and lifting of restrictions on advertising and media in several markets.

For Japan, the second-largest ad market in the world, Saatchi predicts spending will increase by 6.9% (5.4% after inflation) to \$23.5 billion this year.

In Australia, spending is expected to increase by 9.9% (2.3% after inflation) in 1988. New Zealand is predicted to grow by 13.8% (5.5% after inflation).

Saatchi didn't make individual forecasts for Latin American countries but predicts the whole region's spending will grow by 9.2% this year to \$3.2 billion and by 8% in 1989 and 8.1% in 1990. #

Straight lines

Matsushita Electric Industrial Co. touts its National Cordless Hairform as "The quickest way to keep your hair straight," with this outdoor board created by Dentsu, Osaka. This ad won the poster category in the 41st Dentsu Advertising Awards, open to all agencies in Japan.

World News Roundup

(Continued from Page 3)

nels Mr. Murdoch plans to launch on the Astra direct broadcast satellite in late 1988.

SINGAPORE—New Paper, an English-language newspaper patterned after *USA Today*, will be published here later this month by Singapore Press Holdings.

MADRID—Cortefiel, the Spanish clothing chain, moved its \$1.3 million account to Solucion/BDDP here. The account previously was in-house.

MONTREAL—Royal Trust, a banking company here, moved its \$1.2 million Quebec account to Prism Communications from Ogilvy & Mather. However, O&M, Toronto, continues to handle the account outside Quebec.

KUALA LUMPUR—Kentucky Fried Chicken moved its \$1 million account to HDM/DYR Malaysia from McCann-Erickson Malaysia.

PARIS—Groupe Louis Vuitton acquired Givenchy Couture for \$25.4 million. Vuitton, which last year merged with Groupe Moët Hennessy, owns Parfums Givenchy.

P&G fabric softener makes fresh start

By MARINA SPECHT

MADRID—Procter & Gamble Co. is relaunching Lenor fabric softener in major European markets, an effort to regain market share lost to Unilever and other rivals.

The reformulated product, using new technology the company says improves softness, begins its rollout in Spain, where Lenor wasn't previously sold. P&G launched it there last month, backed by an estimated \$3.5 million ad campaign via Grey Advertising, the Lenor agency throughout Europe.

The new technology surfaced in the U.S. in mid-1987, in the company's Downy brand.

Unilever executives said the relaunch was spurred by P&G's declining share in fabric softeners.

Lenor is a liquid fabric softener throughout Europe, except in West Germany where a Lenor dryer sheet was added to the Lenor liquid, liquid concentrate and liquid refill

pouch product line last year.

P&G's share of the U.S. liquid softener market fell from 42% in 1981 to 38% in 1986, while Lever Bros.' share climbed from 7% to 36%, a Unilever spokesman said.

In 1981, P&G and Unilever were tied in Europe with 21% of the softener market each. Unilever now claims a 25% share, followed by P&G with 17%, a Unilever spokesman said.

Colgate-Palmolive Co. and Henkel each hold 13% to 14% of the \$900 million European fabric softener market, which is growing 7% yearly.

"P&G is reacting to every Lever move in Europe because they don't want us to be even further ahead of them," said Gonzalo Sordo, marketing manager at Lever Iberica.

Unilever is relaunching in Europe its fabric softener, known as Snuggle in the U.S.

The brand is sold in Europe under various names that indicate some-

thing cuddly in local languages. The brand is called Mimosin in Spain; Cajoline in France; Cocolino in Italy; Robijn in Belgium and the Netherlands; and Kuschelweich in West Germany and Austria.

Unilever has centralized production of European spots at Lintas:Worldwide. Previously, each country created its own spots featuring the same teddy bear used in the U.S. Snuggle campaign.

Now, a pool of European commercials is produced in New York from European creative work.

In Spain, P&G introduced Lenor softener a week after the relaunch of Mimosin, the market leader. Mr. Sordo said Mimosin has a 25% share, while a P&G spokesman put the Lenor share at 22%.

Ten-second TV spots by Grey urge consumers to "Discover Lenor, a new world of softness." Longer spots, also by Grey, broke last month.

"P&G sped up the Lenor launch

in Spain in order to make it coincide with Lever's relaunch of Mimosin," Mr. Sordo said.

A Spanish P&G spokesman denied any link between the launches. Lintas handles Mimosin.

Lever boosted Mimosin's ad budget by 80% to \$2.8 million this year and expects P&G to spend \$3.5 million on Lenor in its first year. P&G refused to disclose ad spending.

P&G may have trouble carving a place in the \$110 million Spanish fabric softener market from well-established brands like Mimosin, Henkel's Vernel and Flor, owned by local marketer Camp.

The latter two have about 20% of the market each.

In other European markets, P&G introduced New Lenor in the U.K. in June in two fragrances. An ad campaign by Grey breaks this summer to challenge U.K. market leader Comfort, another Unilever brand.

Lenor is brand leader with a 43% share in Germany, P&G's biggest

European market and the country with the world's highest per household consumption of fabric softener. Last month, P&G added a Summer Fresh Lenor line, including a concentrate and refill pack, also backed by a Grey-created campaign.

In France, where Lenor's 10%-to-15% market share trails Colgate's Supline (33%), Unilever's Cajoline (25%) and Henkel's Mini Doux line (25%), the superconcentrate market is heating up.

Henkel has won about 20% of the French softener market with its Super Mini Doux line extension, now accounting for the lion's share of the Mini Doux line.

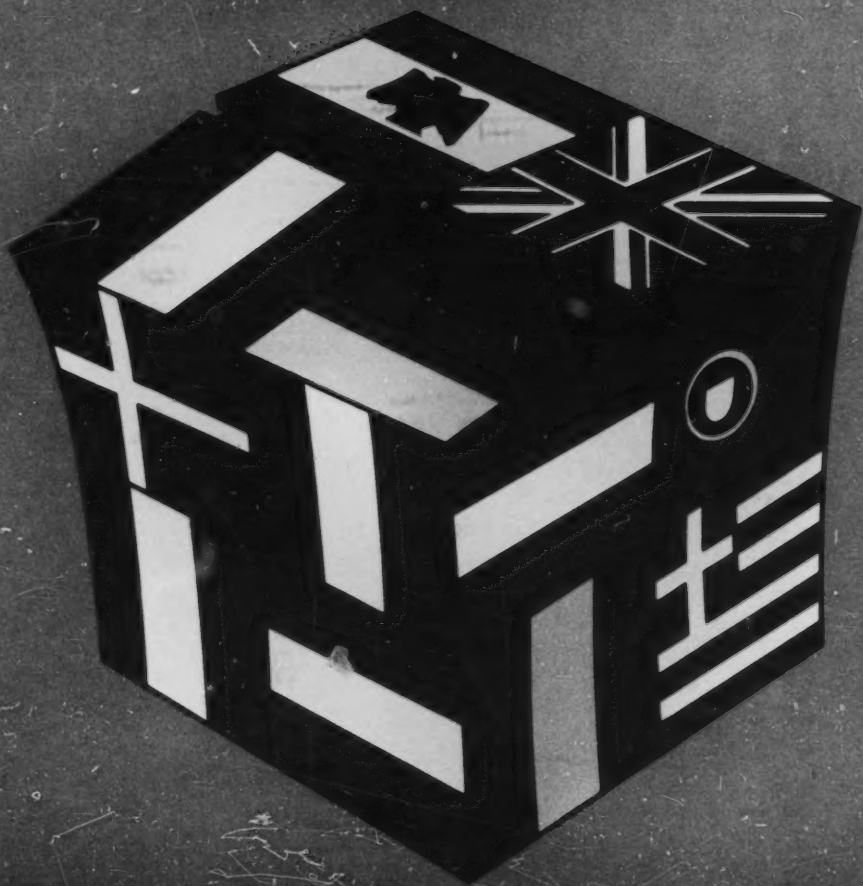
P&G and Colgate followed last year with Lenorette and Ultra Doux Supline superconcentrates but haven't stolen share from Henkel. #

Dagmar Mussey, Duesseldorf; Anika Michalowski, Paris; and Laurel Wentz, London, contributed to this story.

Advertising Age®

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

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The Selling of
Europe**



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Big Bang II: Shops seek media ties

By LAUREL WENTZ

From New York to Singapore to Sydney, the next wave of "Big Bang" agency combinations is arriving, only this time among media-buying departments looking to increase their clout.

Even giant Saatchi & Saatchi Co. said it would consider linking up with non-Saatchi agencies outside the U.S. and the U.K. to jointly buy time and space in media.

In the U.S., Saatchi will decide soon whether to implement a feasibility study focused on joining the media-buying operations of its three key units: Backer Spielvogel Bates, Saatchi & Saatchi DFS and Campbell-Mithun-Esty.

The total domestic billings of those three agencies are about \$3.6 billion annually.

The fear that Saatchi will aggressively pool that media weight and position itself for huge media discounts is what's spurring concern—and action—among other major agencies and agency groups.

As many advertisers consolidate buying at one agency or take it in-house in the U.S., agencies without enough clout to demand the best prices and ad schedules are fear-

- Bozell, FCB, others look for linkups—P. 1
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ful they'll be left out in the cold.

Agencies that would never think of joining operations with competing shops—because of client conflict problems—are putting together deals outside the U.S.

In the Netherlands, six competing agencies—including Young & Rubicam, Ogilvy & Mather and J. Walter Thompson Co.—will launch a media-buying group in September, called the Media Buying Center.

In Argentina, Spain, Belgium and France, competing agencies already have formed huge media-buying units.

Industry executives now see this happening in the U.S. Sources say every major agency—and particularly those that aren't part of a large holding company—are talking to one another about teaming up for media buys (see story on Page 1).

Omnicom Group and O&M parent Ogilvy Group last week confirmed they were talking about a worldwide joint media-buying venture that would have massive client conflict implications in the U.S.

BBDO Worldwide and DDB Needham Worldwide are the two largest units of Omnicom.

"If they can join their media-buying departments, it's
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Advertising Age

Crain's International Newspaper of Marketing.

Wanted: Media muscle

Ad agencies race to form buying linkups

By GARY LEVIN

NEW YORK—Major ad agencies, worried that they need to increase their media-buying clout quickly, are considering the unthinkable: linking up with competitors.

An even bigger shock is that several advertisers appear to be going along with the potential client conflicts such combinations might cause (see story on Page 74). One key source even termed the agency moves to consolidate "client-driven."

Executives at many large agencies and holding companies, including Omnicom Group; Ogilvy Group; Bozell, Jacobs, Kenyon & Eckhardt; Foote, Cone & Belding Communications; and J. Walter Thompson Co. all say they are exploring media-buying consolidations.

"Everybody's talking to everybody," said Joseph Ostrow, exec VP-worldwide media director at Chicago-based Foote, Cone & Belding.

"The exploration deals more with the efficiency of operations in many cases than it does truly with clout," said Charles Peebler Jr., CEO at BJK&E, New York. "If it's done right, it will probably increase agency profitability and efficiency, while offering clients the same or better service."

Last week, sources said Omnicom and Ogilvy executives were talking about worldwide linkups of the two, including setting up a separate company to handle all global buying. Each company confirmed that talks were being conducted but declined to name who they were talking with.

Saatchi & Saatchi Co., London, has completed an internal study of media centralization and said it may link up with rival agencies in addition to combining the buying operations of its already massive agency units.

One source said a major fear among



"We've clearly and obviously been talking to several potential partners. It's quite a prevalent concern at many agencies."

—Allen Rosenshine

"We have no agreements, but we are exploring what kinds of combinations might make sense to us."

—Kenneth Roman

agencies that work for Procter & Gamble Co. is that Saatchi will put together an efficient media-buying operation for its units and that P&G at some point will consolidate all its buying at Saatchi.

P&G refused to comment on that scenario. "We ask our ad agencies to work constructively with us to understanding our strategies and then to make the most efficient buys possible in the execution of those

strategies," a P&G spokeswoman said. "How the agencies organize to achieve that [goal] for us is their business."

Some large agencies or agency groups—including Interpublic Group of Cos. and N W Ayer—said client conflicts and other competitive issues appear to outweigh the benefits of media combinations, particularly in the U.S.

"We're not convinced that being bigger is necessarily buying better," said Marcella Rosen, senior VP-managing director of media services at Ayer.

Philip Geier, Interpublic chairman-CEO, remains wary of creating any semblance of conflict among his holding company's units. For now, he said, worldwide media consolidation isn't in the cards, adding, "I'm not saying it won't happen three to five years from now."

Young & Rubicam, D'Arcy Masius Benton & Bowles and Grey Advertising are closely monitoring these media developments and may decide to join the fray.

"We're always looking for ways to better serve our clients," said Y&R Chairman Alex Kroll.

There's concern that once agencies link buying units and get clients with competing accounts used to the idea, they can then more easily move into other combination arrangements, including media planning, research and even creative.

"I would be very, very surprised to learn that our major competitors are not involved in similar discussions," said Omnicom Chairman-CEO Allen Rosenshine when confirming his group's interest. "We've clearly and obviously been talking to several potential partners. It's quite a prevalent concern at many agencies."

Kenneth Roman, chairman-CEO of Ogilvy Group, said in a statement that "partner-

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Last Minute News

Sprint calls on Sedelmaier

KANSAS CITY, Mo.—US Sprint on July 18 breaks two humorous, 30-second network TV commercials, directed by Joe Sedelmaier, that stress the clarity of its long-distance service. J. Walter Thompson USA, San Francisco, handles Sprint's \$35 million account.

Wisconsin milk board dumps DMB&B

MADISON, Wis.—The Wisconsin Milk Marketing Board dropped incumbent D'Arcy Masius Benton & Bowles, Chicago, from the review of its estimated \$8 million cheese account (AA, March 21). The four finalists for the assignment include Foote, Cone & Belding and Campbell-Mithun-Esty, both Chicago; and Frankberry, Laughlin & Constable, Milwaukee. The identity of the fourth finalist isn't known. Also, the board recently moved its \$1 million milk account to McCann-Erickson, San Francisco, from DMB&B.

GF's Smith may be leaving

RYE BROOK, N.Y.—Neither General Foods nor its parent, Philip Morris Cos., would comment last week on rumors that GF Chairman-CEO Philip Smith is leaving the company, other than to say that Mr. Smith "hasn't resigned." But analysts and other sources said they believe Mr. Smith's resignation is imminent, though it's unclear whether he'll join Pillsbury Corp. as CEO (AA, June 27). Pillsbury has said it wants to name a new CEO before its September annual meeting. According to published reports, Mr. Smith may be in line to succeed Campbell Soup Co. CEO R. Gordon McGovern. Campbell wouldn't comment on the re-

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Spielvogel, Connors joining Dukakis team

By STEVEN W. COLFORD

Democratic presidential contender Michael Dukakis is putting together a high-power team of ad advisers that includes agency chieftains Carl Spielvogel, Marvin Sloves, Jack Connors and Frank Mingo.

Messrs. Spielvogel, Sloves and Mingo said they committed to work, in a limited fashion, on campaign ads for the Massachusetts governor after they'd been approached by Dukakis aide Tom Kiley.

Sources said Mr. Connors, president-CEO of Boston-based Hill, Holliday, Connors, Cosmopolis, and Mr. Spielvogel, chairman of Backer Spielvogel Bates Worldwide, New York, are advising the

campaign on advertising personnel matters, such as who to recruit and how to form an ad team.

Mr. Sloves is chairman of Scali, McCabe, Sloves and Mr. Mingo is

Campaign

chairman of Mingo Group.

Dukakis aide Mr. Kiley initially asked Mr. Spielvogel, who's active in New York Democratic politics, if his agency would be interested in handling the Democratic presidential ad effort. The assignment would have given Backer Spielvogel Bates a good chunk of the estimated \$55 mil-

lion in federal funds that will fuel the Dukakis campaign.

"But I told them there was no way the agency would handle their account," Mr. Spielvogel said. "We don't do political accounts in the U.S."

"I counseled him instead to try to put together a group of people patterned after Reagan's Tuesday Team, and he agreed... that cherry-picking the best people is a better idea."

Mr. Spielvogel said he advised the governor's aides to find a "first-class general manager" to oversee an ad team comprising at least two full creative units, in addition to the political ad executives who handled the Dukakis campaign's primary election ad-

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NBC rakes in upfront deals

By VERNE GAY

New York—The network TV upfront market blasted off last week, with NBC pulling in an easy \$400 million in 1988-89 prime-time sales.

The top-ranked network should close in on a record \$1.3 billion any time soon, in what has been a surprisingly energetic advance-sales market.

A surge of automotive money from Detroit reportedly is leading to higher prices than expected, although some agency executives disputed that.

Sources said NBC was getting high single-digit increases on costs per thousand last week while CBS was cutting deals at increases of about 6% and ABC was holding out for even higher prices.

Leading the charge was Leo Burnett Co., Chicago, which bought more than \$300 million worth of NBC inventory, much of it for McDonald's Corp. and General Motors Corp.

Procter & Gamble Co., the nation's leading TV advertiser, also weighed in with a multi-million-dollar commitment on NBC.

Burnett's buy was believed to be twice what it spent on NBC for the 1987-88 TV season. Young & Rubicam and D'Arcy Masius Benton & Bowles also are close to completing buys on CBS and NBC.

If last week's buying binge seems like a one-network party, it was. By early Friday, ABC and CBS together had closed less than half the amount of NRC, though American Home Products Corp. reportedly made an unusual multiyear, multiplatform deal with CBS. Neither company would confirm that.

The outlook appears uncertain for second-ranked ABC. Sources said that network's pricing was extremely bullish.

ABC reportedly refused to close anything below 11% price increases, which apparently is why it did so little business last week. Burnett reportedly spurned ABC because of high prices.

"ABC has not been receptive [to lower prices] because they feel they... hold a lot of cards, and they do," said one agency executive. "They're saying, 'You can't walk away from us,' and there's some validity to what they're saying."

ABC appears to be waiting for NBC to become heavily sold; at that time, NBC's prices could surge and advertisers would be forced to buy ABC, which thinks the market is larger than its rivals believe.

Observers speculated that NBC opened the market with lower prices to establish a solid base for higher pricing as inventory was depleted.

Despite last week's sales, this year's sales aren't expected to match last year's \$3.1 billion in upfront spending.

The upfront market has been thrown into confusion by the Writers Guild of America strike, now in its 20th week.

Late last week, the guild approved an interim agreement allowing writers to work for independent production companies that signed the union's pact. But the Big 3 networks insist they won't buy shows coming out of that alliance, and that may prolong the strike that has crippled TV production.

NBC earlier had agreed to air certain ex-

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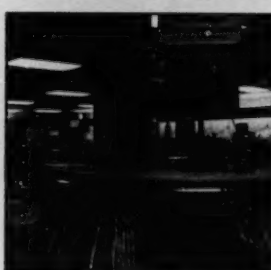
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Vol. 56, No. 29—ADVERTISING AGE (ISSN 0001-8899) is published weekly except semiweekly the fourth week in March and the fourth week in September at 740 Rush Street, Chicago, Ill. 60611-2590. Second-class postage paid at Chicago and additional mailing offices. Send address changes to ADVERTISING AGE, Circulation Department, 965 E. Jefferson, Detroit, Mich. 48207. \$2.00 a copy, \$64 a year, \$109 two years. Add \$104 per year for air delivery to Europe & Middle East. Add \$49 for surface mail to all other foreign countries. WILLIAM STRONG, VP-circulation; JOHN HUFFMAN, fulfillment director; DAVE KELLEY, circulation manager. Four weeks' notice required for change of address. Address all subscription correspondence to Circulation Department, Advertising Age, 965 E. Jefferson, Detroit, Mich. 48207. Microfilm copies are available from University Microfilms, 300 N. Zeeb Rd., Ann Arbor, Mich. 48103. Microfilm copies are available from Bell & Howell, Micro Photo Division, Old Mansfield Rd., Wooster, O. 44691. AD AGE is available for electronic retrieval on the NEXUS® Service, Mead Data Central, Inc., P.O. Box 903, Dayton, O. 45402 (600 227-4900).



IBM eyes big shops as list shrinks to 6

By JON LAFAYETTE
and GARY LEVIN

Big Blue wants a big shop—and one that knows computers.

That's the message behind IBM Corp.'s decision to meet this week with D'Arcy Masius Benton & Bowles; Grey Advertising; Lintas:Worldwide; and Wells, Rich, Greene in addition to incumbents Lord, Geller, Federico, Einstein and Lord Einstein O'Neill & Partners about its \$138 million ad account.

In limiting itself to these New York agencies, the giant computer marketer appears to have eliminated all the smaller shops it initially had contacted, as well as DDB Needham Worldwide; Jordan, McGrath, Case & Taylor; and Scali, McCabe, Sloves.

The agencies in the final review will be given identical briefings and assigned identical projects to com-

plete. IBM didn't provide details about the nature of the project.

The company expects to decide how to split up its account by the end of August.

Industry observers expect Lord Geller and Lord Einstein to keep some IBM work, but also think that at least one of the bigger agencies will get the bulk of the business.

IBM has said little about why it selected these finalists. "We feel that each has potential to meet our current and future advertising needs," a spokeswoman said.

The anointed agencies were told only that they had advanced to the next round of the review, and the time and place of the briefings.

But size and current or past connections to the computer marketer apparently counted.

Grey Advertising's direct-re-

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Camel rides Old Joe

RJR aims new ads at young smokers

By JUDANN DAGNOLI

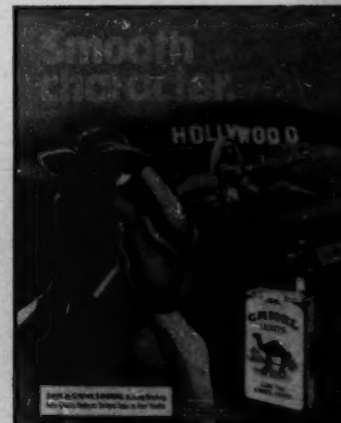
R.J. Reynolds Tobacco Co. is updating its Camel and Salem advertising to lure younger smokers away from Marlboro country.

Slick gimmickry in new efforts for both RJR brands is designed to bring back the segment now dominated by Philip Morris Cos., whose share of the youth market (smokers ages 18 to 24) is 65%, compared to RJR's 17%, according to Salomon Bros. analyst Diana Temple.

Much of that younger segment smokes PM's flagship Marlboro, which long has used cowboy imagery in its advertising.

Old Joe, the camel that has symbolized Camel cigarettes for three-quarters of a century, has discovered the fountain of youth in a new campaign breaking later this month.

Ads themed "Smooth character" (Continued on Page 76)



Old Joe is up to some new tricks, trying to appeal to younger smokers, in new ads from R.J. Reynolds and McCann-Erickson.

International agencies report on key clients

For this fourth annual ADVERTISING AGE report, agencies listed their major multinational clients using the following criteria:

- Accounts must be served in at least three countries as of Dec. 31, 1987.
- The combined client business must total at

Charts don't break down all offices; information about some countries was not included. Additional business is listed in the footnotes following the summaries. An asterisk denotes an agency that included affiliated agencies in its report.

Source: N.W. Ayer. "Non-equity affiliation."

N W Ayer, New York, had non-U.S. gross income of \$49.9 million in 1987, up 49% from 1986. Non-U.S. billings were up 48% to \$339.8 million.

Worldwide gross income was \$166.1 million. Worldwide billings totaled \$1.2 billion.

Ayer holds majority or maximum-allowable stock in 10 agencies, minority ownership in

BACKER SPIELVOGEL BATES WORLDWIDE	The Americas										Europe												Pacific													
	USA	Argentina	Brazil	Canada	Chile	Peru	Mexico	Colombia	Ecuador	Venezuela	Austria	Belgium	Denmark	France	Germany	Italy	Netherlands	Norway	Spain	Sweden	Switzerland	UK	Greece	Ireland	Portugal	Turkey	Australia	Japan	Hong Kong	New Zealand	Singapore	Taiwan	Malaysia	Indonesia		
Clients:																																				
Air New Zealand																																				
American Cyanamid			✓																	✓	✓	✓						✓								
Austin Rover																																				
Asis	✓																																			
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Castle & Cooke	✓																																✓			
Ciba-Geigy																																				
De Beers																																				
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Diners Club																																				
Duracell																																				
Electrolux																																				
Estee Lauder	✓													✓																						
Eveready Batteries		✓	✓	✓	✓	✓	✓	✓	✓	✓																				✓						✓
Fisher-Price	✓			✓																																
Histori/Saiko	✓				✓			✓		✓							✓																	✓		
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Pet Food	✓											✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Other	✓			✓								✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
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Source: Becker-DeMunnick/Bates Worldwide

Backer Spielvogel Bates Worldwide, New York, had non-U.S. gross income of \$339.1 million in 1987, up 33% from 1986. Non-U.S. billings rose 35% to \$2.3 billion.

Worldwide gross income was \$600.7 million in 1987. Worldwide billings were \$4.1 billion.

Backer has 102 overseas offices in 46 countries.

It was formed when parent Saatchi & Saatchi merged Backer & Spielvogel with Ted Bates Worldwide. In March, the London office of Dorland combined with BSBW there, form-

Source: BBDO Worldwide. *Non-equity affiliations.

BBDO Worldwide, New York, had non-U.S. gross income of \$225.6 million in 1987, up 63% from 1986. Non-U.S. billings rose 17% to \$1.4 billion.

Worldwide gross income reached \$537 million in 1987. Worldwide billings were \$3.7 billion.

BBDO has 120 offices in 50 countries outside the U.S. and holds equity in 112. BBDO is part of Omnicom Group, along with DDB

Source: Boulet Dru Dupuy Petit "Non-equity affiliation"

Boulet Dru Dupuy Petit, Paris, reported non-U.S. gross income of \$45 million in 1987, a 39% increase over 1986. Non-U.S. billings increased by 36% to \$297.5 million.

It owns 100% of its French agency, a majority share of agencies in Belgium and Italy, and a minority stake in a Spanish agency. It acquired a majority share in a U.K. agency in

DOZELL, JACOBS, KENYON & ECKHARDT		The Americas									Europe												Pacific								
		USA	Argentina* Brazil*	Canada	Chile	Peru	Uruguay	Mexico	Puerto Rico	Austria*	Belgium	Denmark	France	Germany	Italy	Netherlands	Norway*	Spain	Sweden*	Switzerland*	UK	Portugal*	Greece	Africa	Australia*	Japan	Hong Kong	New Zealand*	Singapore	Thailand*	Malaysia
Clients:																															
American Airlines		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Chrysler		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
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Nabisco		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Patel, Philippe		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓